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***See separate Resolved Issues document**
Highlighted entries will be moved to the resolved issues list January 1, 2003

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
18	<p>For end use customer billing (dual billing situation), ACC Rules are not specific about what the utility and ESPs are obligated to show on their bills.</p> <p>ESP</p> <p>Participation Required</p>	02/02/00	Billing			<p>02/02/00 In many markets (CA specifically) begin and end meter reads need not be displayed on a bill. In Arizona market, utilities are required to show specific pieces of information but it's unclear if ESPs are required to follow same rules.</p> <p>This could apply to all revenue cycle services.</p> <p>02/24/00 (ACC - Bill Rigsby) reported on ACC Rules, refer to sections R14-2-210B-2 and R14-2-1612. Verbiage states that ALL bills must contain the data elements referred to in these sections. UDCs would be required to show a generation line item on their bill (dual billing) showing a zero amount due. Additionally, ESP would be required to show a CTC charge on their portion of the bill with a zero amount due.</p> <p><u>Action:</u> ESPs/UDCs create a proposal for short term solution which may require filing for waiver to the Rules as a short term solution. All parties to come up with possible long-term changes to the Rules.</p> <p>Issue for MRSPs: Begin and end reads must be printed on bill according to the Rules. So, these must be passed to the billing parties.</p> <p>03/08/00 Should a Rule change be suggested as a short-term solution. It is possible to put this in a combined waiver of issues that need to be changed in the Rules. A long term solution would be actually to change the verbiage.</p> <p><u>Action:</u> ESPs and UDCs should come prepared with their company's position in regards to filing waivers. Group will come up with proposal about how this issue should be resolved.</p> <p>03/14/00 Decision to have a separate waiver filed for this issue (separate from #28,36, & 56).</p> <p>03/22/00 Proposal: Bill party needs to itemize the bill com-</p>	1	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						ponents to allow customer to break down/re-calculate the bill. 10/11/00 – October 4, 2000 Rule tweaking package approved – 1612 changed but not 210 B2. 210 B2 DOES need to be chngd. Shirley will let Barbara Keene know and wait for direction from Staff on how to handle the existing waiver. 2/21/01 Barbara Keene had advised the group at a previous meeting that the PSWG might need to submit a new waiver with documentation to support the waiver.		
30	Do we need to prioritize transactions by importance due to financial considerations and customer service (for problem resolution and cycle time of EDI 824)? Participation Required	01/27/00	Remittance			Example, SRP requires acknowledgement both incoming and outgoing within 24 hours. All subcommittees need to define transaction cycle time.		Open
31	Is there a need to standardize dual path or single path when handling the 820? Do we provide a remittance advice directly to ESP and payment directly to bank (dual path)? OR do both documents go directly to bank (single path)? Participation Required	01/27/00	Remittance			Payments go to bank and details go to provider. Since most banks are currently using VANS, sending both transactions may be costly to sending parties. 2/21/01 –TEP & SRP use a dual path, APS uses a single path. This issue will be discussed more if the future.		Open
41	Who is responsible for validating that a meter can be read after a MSP has set a new meter? “Day of Install” (Day of Removal, issue	01/27/00	Meter-VEE			In CA, it's a requirement from CPUC (Rule 22), the ESP is responsible for ensuring newly installed meter can be read prior to 1 st billing by MRSP or face penalties. 02/03/00 (First Point) This is usually done at the meter install time.	3	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
	103) Participation Required					<p>04/27/00 To be addressed in the VEE sub/subgroup.</p> <p>2/7/01 – the group clarified that this issue involves both the MSP and the MRSP</p> <p>3/21/01 The group agreed that a separate Task Team is required to develop the Day of Install and Day of Removal Process covering both MSP and MRSP responsibility. The Task Team will make a recommendation on where the process will reside (i.e. VEE doc, Metering Handbook etc).</p> <p>The group agreed to allow the MRSP or MSP Performance Task Team (whoever finishes first) to complete the Performance Monitoring document until they are ready to look at Day of Install/Day of Removal. At that time, the MRSP Performance Task Team will be put on hold while the Day of Install/Day of Removal task Team is established to complete the process. Once this process is complete, the MRSP Performance Task Team will re-group to develop the Performance monitoring criteria around Day of Install/Day of Removal. The MSP Performance Monitoring Task Team will also incorporate into their Performance Monitoring into their document.</p>		
42	<p>Will we require an 824 on all transactions (accepted or take exception to a data element). Do we only want to get an 824 when there's a problem with data? (PSWG - Policy)</p> <p>Participation Required</p>	02/01/00	Remittance			<p>08/22/01</p> <p>APS: Not used for an 814. Does not recommend using for an 867 because no way to send back to ESP/MSP. APS recommends sending the 824 for invalid 810 and 820 data,</p> <p>TEP: Automatically sends verification (997) of the data currently. TEP does not recommend setting up an 824 response to the 867 or the 810</p> <p>CUC: Recommends usage of an 824 for invalid 867, but not acceptance of the 867. An 824 sample from the mid-Atlantic region is available from Citizens for interested parties.</p> <p>SRP: Currently sends the 824 for all 867s.</p> <p>COOPERATIVES: Recommends not implementing or using the 824.</p> <p>This is an issue that requires a task team and requires ESP participation, not an issue that can be resolved at this time.</p>		Open
47	Standardization of Billing Options (ESP and UDC)	01/25/00	Policy			A working group of market participants should study the intent of Commission Rules and make a determination that	2	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
	<p>consolidated billing as well as Dual billing) from all UDCs should be implemented immediately to provide customer choice. Include related changes or impacts to other processes or procedures. (APSES)</p> <p>Participation Required</p>					<p>applies to all UDCs. Terms and Conditions for credit, payments and partial payments, and other billing processes should be standardized for all UDCs. During the direct access rulemaking process, an earlier working group discussed whether billing options should be discretionary, but no consistent position was reached. Market participants need to clarify the procedures for consistency among UDCs.</p> <p>In order to develop a viable direct access market, the limitations on customer choice caused by differences in billing procedures among UDCs will be removed. Customer confusion and criticism will be reduced, and ESPs will have flexibility to meet individual customer needs.</p>		
49	<p>Develop interim business processes that can be implemented manually, and plan mapping for both out-bound (UDC to ESP) and in-bound (ESP to UDC) DASRs for the following communications. Business processes should be implemented immediately by each UDC with as much consistency as possible, and EDI mapping can be phased in.</p> <p>Customer Moving: - Notification of direct access customer moving to new address within the same distribution company territory without having to return to bundled service. (APSES)</p> <p>Participation Required</p>	01/25/00	DASR			<p>Customers need the flexibility to contact either their ESP or UDC to implement a request, as provided by proposed business processes. The customer's choice and other information can be communicated by e-mail or fax until out-bound/in-bound DASRs are functional. Customers will not be burdened with having to make numerous phone calls to UDCs and ESPs to implement their service choice. To develop a viable direct access market, the burdens and costs caused by unnecessary switches to/from bundled service will be removed. "Customer choice" will become more of a reality.</p>		Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
50	New Customer - Same Facility: - A new customer takes over an existing direct access facility, keeps same ESP and meter without returning to bundled service. (APSES) Participation Required	01/25/00	DASR			see Issue 49, Description, paragraph 1		Open
51	Account Update – Notification of changed account information. UC and PD DASRs appear to be both in/out-bound in the Arizona DASR Handbook (APSES) Participation Required	01/25/00	DASR			see Issue 49, Description, paragraph 1		Open
52	UDCs and market participants need a clearly-defined communication process for promptly communicating and resolving problems with data, meters, or bills among ESPs, MSPs, MRSPs, and UDCs (APSES) Participation Required	01/25/00	Policy			<p>Refer to Issue 34</p> <p>Process should be initiated by any participant to establish communication to solve problem within a defined time frame, if possible, and, if necessary, to maintain communication until root cause analysis is complete. Standardized process should be implemented immediately by each participant and automated by all parties as soon as possible.</p> <p>An example of the California “MADEN” process is attached to the original change control document.</p> <p>Process will reduce meter and data errors that cause billing errors and delays in billing and receiving revenue. It will help provide customer satisfaction by reducing billing questions and complaints to both UDCs and ESPs.</p> <p>6/20/01 Citizens presented a sample MADEN for group discussion.</p>	3	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						9/26/01 UDCs and market participants need a clearly-defined communication process for promptly communicating and resolving problems with data, meters, or bills among ESPs, MSPs, MRSPs and UDCs. Everyone agreed that the Maden issue is important but due to lack of market participation, etc. issue will be put on hold until 2002.		
60	According to the Rules, a third party can be back billed up to 12 months. What will the process be for back-billing third parties? (R14-21-E3) Participation Required	02/08/00	Billing			*Refer to Issue 70 05/02/01 This issue was earlier identified as a “quick hitter”, one that could easily be resolved, however at this meeting the group discussed the issue and determined that this is not a quick hitter. This is a process requiring a task team with scenarios covering different billing options, what happens when a customer switches ESPs one or more times. Other questions include: What happens if the third party to bill is no longer in business? What information is placed on the bill and whom do you send the bill to?	2	Open
80	What are the security and encryption standards that will be used in transmitting data (Barry Scott). Participation Required	05/09/00	Policy			06/22/00 Priority set at 1.	1	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
85	<p>Grandfathering totalization of meters.</p> <p>Participation Required</p>	07/20/00	Policy			<p>Issue statement unclear</p> <p>08/22/01</p> <p>The issue is interpreted as the meters which were totalized prior to DA activity have the right to remain totalized when switching to DA as well as after the customer returns to SO.</p> <p>APS: Customers can go DA and return to SO totalized.</p> <p>TEP: Cannot discuss this issue, confidential negotiations.</p> <p>CUC: Recommends not grandfathering totalized meter accounts, The account should be reviewed on a case-by-case basis.</p> <p>SRP: Customers can go DA and return to SO totalized.</p> <p>COOPERATIVES: Customers can go DA and return to SO totalized.</p> <p>Electrical Districts: Customers can go DA and return to SO totalized.</p> <p>The rules state you must bill each SDP separately unless the Utility has a totalized tariff or a special contract to totalize.</p> <p>The issue is not resolved. Will be re-visited if, and when TEP can discuss. May be resolved at a higher level.</p>		Open
94	<p>What is the timeframe for UDC to exchange the meters to return direct access customers to bundled service</p> <p>Participation Required</p>	10/25/00	Metering			<p>ESPs want a required timeframe for UDCs to complete the exchange and ret cust to Bundled serv.</p> <p>10/11/00 New West Energy proposed a 10 working day from the DASR requirement.. UDCs to review and comment at next meeting</p> <p>10/25/00 The group discussed the issue and agreed to table it until Staff confirms if Standard Offer cust can own meters or not.</p> <p>11/29/00 – UDC processes have been documented in the Business Rule document. Will address this issue once the market is more established.</p> <p>4/18/01</p> <p>The time frame is: if the DASR is submitted 15 days prior to the read date, the meter change will occur on the read date. If not, the meter change will occur on the next read date. As stated by rule : R14-2-1612-J</p> <p>This issue is deferred until the market demands this item be</p>	2	Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						addressed		
99	The use of Electronic Signatures for DA transactions (House Bill 2069) Participation Required	11/15/00	Policy			11/15/00 The metering group requires a signature for the exchange of the EPA form. Since metering is not the only group that this may apply to, it is passed to Policy and will be raised on 12-4-00. 2/21/01 – The group added that any request for data would also require a signature.		Open
102	Modify 867 to meet VEE rules PSWG UDC	7/13/00	Policy			07/20/00 Missing intervals and zero intervals referred to next VEE session.		Open
103	Day of Removal (Day of install issue 41) Participation Required	2/21/01	Policy			3/21/01 Need to develop a procedure to ensure that when a meter is removed that all data is captured. Develop who is responsible for posting up to what time 3/21/01 The group agreed that a separate Task Team is required to develop the Day of Install and Day of Removal Process covering both MSP and MRSP responsibility. The Task Team will make a recommendation on where the process will reside (i.e. VEE doc, Metering Handbook etc). The group agreed to allow the MRSP or MSP Performance Task Team (whoever finishes first) to complete the Performance Monitoring document until they are ready to look at Day of Install/Day of Removal. At that time, the MRSP Performance Task Team will be put on hold while the Day of Install/Day of Removal task Team is established to complete the process. Once this process is complete, the MRSP Performance Task Team will re-group to develop the Performance monitoring criteria around Day of Install/Day of Removal. The MSP Performance Monitoring Task Team will also incorporate into their Performance Monitoring into their document. 9/26/01 There was confusion on day of install or day of removal. TEP to reword and send questionnaire to all the market participants. Set for agenda of the 10-24-01 10/24/01		Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						<p>TEP presented it position on Issue 103 the rest will provide comments by 11/14/01 meeting</p> <p>11/14/01 APS and TEP handed out position papers. Citizen agreed with TEP position but need 867 within 3 days. Issue on 12/5/01 meeting.</p> <p>12/5/01 Day of Removal relating to timing requirements for posting the 867. If a company enforces a blackout window, this should not be an issue. Otherwise , a “work around” will be needed.</p>		
104	<p>Develop VEE rules for Non IDR</p> <p>Participation Re-quired</p>	2/7/01	Policy			<p>02/07/01 Will Require a Task Team</p>		Open
105	<p>MSP/MRSPs should be allowed to subcontract for services to qualified personnel, without having to make them employees of the company, as long as the certificated MSP/MRSP is still responsible for the work they perform.</p> <p>Participation Re-quired</p>	2/7/01	Policy			02/07/01 Copied from issue 56 to separate the two issues.		Open
106	<p>Develop a document showing all agreed upon billing business rules</p> <p>PSWG UDC</p>	2/07/01	Task Team			<p>02/07/01 Refer to issue 96</p>		Open
110	What is the process to	2/21/01	Policy			2/21/01 (From Metering Business Rule doc.)		Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
	ensure that all meter data is in before the account goes back to bundled service? Participation Required					How does UDC verify with the ESP that all the data is complete? If data is incomplete how does UDC notify ESP? (data from a previous billing cycle not final bill data). This is being referred to VEE as of 9/27/00 but left here to make sure it is covered and does not need to be part of the Bus Rule Doc.		
113	Do the performance standards created for MRSPs and MSPs apply to the UDCs? Participation Required	04/18/01	MSP			04/18/01 Issue raised by Janet Henry (AXON FS) at MSP meeting 09/12/01 The group discussed the issue and initial thoughts were that performance standards created for MRSPs and MSPs for direct access customer apply to UDCs. After further discussion, it was group consensus that the issue cannot be resolved until there is market participation from the MRSPs/MSPs (do they intend to monitor UDCs? Would they use the same standards?). Additionally a Non-IDR VEE standard needs to be created to complete the picture for performance monitoring. Issue will remain on the issues list until market participation is involved and a Non-IDR VEE standard is created.		Open
116	On incoming DASR – only kWh meter number is required. State DASR handbook does not accommodate totalized metered, and metered – unmetered account combinations Participation Required	05/02/01	Policy			05/02/01 Policy 9/26/01 On incoming DASR, only kWh meter number is required. State DASR Handbook does not accommodate totalized metered, or metered and unmetered account combinations. Pending until DASR handbook is revisited.		
117	If after receiving an RQ DASR and UDC is planning to disconnect for non-payment or turn off a customer AFTER the switch,	05/02/01	Policy			05/02/01 Policy		

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	<p>what is process to notify ESP that customer will be disconnected? (PSWG – Billing)</p> <p>Participation Required</p>							
118	<p>ESP Performance Monitoring is as important as MSP/MRSP performance monitoring and would like to see it addressed (Citizens).</p> <p>Participation Required</p>	06/06/01	Policy					
120	<p>Which DASR should be used for force close? (Citizens)</p> <p>Participation Required</p>	06/06/01	Policy			<p>06/06/01 Citizens suggests using the TS DASR.</p> <p>07/11/01 Stacy Aguayo (APS) indicated the utility must contact the ESP to generate the TS. This is because the customer may give the wrong address or other incorrect information to the UDC. Otherwise the UDC may accidentally terminate a customer.</p> <p>TEP sends a TS DASR. The ESP must make arrangements to pick up their meter.</p> <p>SRP: Calls the ESP to generate the Disconnect (TS) DASR.</p> <p>The group decided this issue, along with another review of the DASR handbook is needed; the suggestion is to form a task team to consider these issues.</p> <p>In the absence of a state standard, each utility may choose their method of conduct, Using the TS DASR is okay until the DASR handbook can be amended.</p> <p>A new issue was uncovered during the discussion: Issue128: Can the UDC accept any “rejected” DASR from an ESP?</p>		

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						Pending Task Team		
121	Which DASR should be used for disconnect for non-payment situation? (Citizens) Participation Required	06/06/01	Policy			<p>06/06/01 Citizens suggests using the TS DASR</p> <p>07/11/01 TEP sends a TS DASR. APS: did not go that far consider the actual disconnection of service, as most people pay prior to disconnect. Assume at this point that the UDC must still contact the ESP to submit the TS DASR. SRP has ESP consolidated billing, so SRP would never disconnect a customer for non-pay because the ESP is responsible for payment. In the absence of a state standard, each utility may choose their method of conduct, Using the TS DASR is okay until the DASR handbook can be amended.</p> <p>Pending Task Team</p>		
122	Which DASR should be used when the ESP is decertified. (TEP) Participation Required	06/06/01	Policy			<p>7/11/01 Pending Task Team</p>		Open
125	Will the decertification process be included in the performance monitoring for MSPs and MRSPs and be standard across all UDCs? Participation Required	07/11/01	MRSP PM task team			<p>07/11/01 This is regarding decertification in the UDC service territory only.</p>		Open
127	What are the transmission related responsibilities of a	07/11/01	Policy			<p>07/11/01 Citizens (Ken Bagley/RW Beck) raised the issue. Group is</p>		Open

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	UDC in the DA environment, and what ability does it have to set criteria relating to an ESPs energy portfolio? Participation Re-quired					not sure PSWG is the correct forum for this discussion. Ken and Evelyn (TEP) will discuss and determine which entity may be the best group to pose the question to. 09/12/01 PSWG is keeping it open to remind participants of issues that may impact PSWG in the future. 12/5/01 Need to discuss this with the Utility director at a future date.		
129	Consistency in documentation. Docketed EDI 867 in conflict with the director's protocols regarding the time stamp for MRSP. PSWG UDC	08/01/01	Policy			08/01/01 Discussion from the group indicated there is a conflict. A document was started months ago that lists all the all changes to the 867 SRP thought someone at SRP was the document owner, and will try to locate it. The director's protocols indicate that EDI data will be in GMT time and that the enveloping will be in sender's local time. The EDI 867 indicates the data will be in Mountain standard time.		
130	Need to create glossary of deregulation terms PSWG UDC	8/22/01	Policy			8/22/01 While reviewing Metering handbook, group indicated a need to create a glossary of terms to place in either the Metering Handbook and/or ACC website. 4/18/02 APSES and TEP provided lists of terms. The group considered a global glossary of terms to be used for ESPs, MRSPs, interested parties, customers, etc. Another suggestion creating a glossary for just the PSWG – DA related/created documents (i.e.: metering handbook, EDI guidelines, etc). Barbara Keene suggested that consumers might not need all the technical terms (MIRN, EDI, and others). She also indicated that the EFPS rule definitions affect some of the definitions of the current competitions rules. Action Item: The following people volunteered to review the PSWG document. They will identify terms to define. After identifying the terms, the person will document all available definitions found within the document, on the ACC consumer website		Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						http://www.cc.state.az.us/utility/electric/hmpage/electpg1.htm], and the ACC rules. The person will document if there is no definition, or that there is a conflict with the definition based on the comparison with the ACC rules, consumer information glossary, and the document itself. Please include page reference to the term and the reference to the definition(s). DASR – Judy Fregoso – (TEP) EDI 867 – Shirley Renfro (Pinnacle West) Change control process – Kimarie Aycock (APS) VEE – Tony Gillooly (TEP) EDI 810 - Stacy Aguayo (APSES) Metering Handbook – Paul Taylor (RW Beck/Citizens) Participants will give a progress report at the May 16 th Meeting		
133	Chapters pending in the Metering handbook will need to be done separately	10/24/01	Policy					Open
136	Should there be a standard time requirement for cutting a meter read file, example: cut at midnight	3/21/02	Policy			April 18 th ,2002 Discussion among the group on the 867 file sent for Month “A” the end time on the previous 867 becomes the start time on the following month Month A end time last interval: 7:00 GMT (Greenwich Mean Time) Month B start time first interval: 7:00 GMT		Open
139	Need to change the code on field 26 on the state DASR Handbook	3/21/02	Policy					Open
140	Conflict regarding the length of time to linearly interpolate intervals as mentioned in the information for Meter Reader Service Provider (MRSP) for Arizona Certification document and the VEE documents	4/18/02	Policy			March 21,2001 It was clarified that once the Metering Handbook and MRSP performance document are approved and posted , the Performing work on Primary Metered Customers will be removed from the website thus, eliminating confusion. Update from March 21,2002 minutes: The Performing work on Primary Meter Customer was the incorrect document stated. But the MRSP document cannot be removed from the website it contains rules regarding posting data and other vital information. Issue 140 was created to address and record discussions about this conflict.		Open

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
141	What will utilities do when they are approached by inactive ESPs who completed compliance testing and now are asking to become active in their territory? Does the Utility have the issued address? How much time (Months, Years) will the utility allow an entity to be inactive in their territory and NOT re-compliance test?	4/18/02	Policy			Sept 19,2002 Barry Scott (SSVEC) introduced a 1 st draft. Barry was not in attendance , the group review Barry submission and decided due to the importance of this compliance procedure issue some changes were made and relined for correction and was sent back to Barry .		Open
142	The definition of “Adjusted” in the VEE conflicts with how “Adjusted” is used later in the Document , specifically section 4.3	4/18/02	Policy					Open
143	Discussion of the North American Energy Standards Board, Retail Electric Quadrant questionnaire	7/18/02	Policy					Open